ePM Quick Reference Guide #138
Create a Contact Only User

GSA

WHAT IS

Project Certifiers (Project Managers) and Program Certifiers have the ability to request Contact Users. Once the request is submitted through the User Access and Certification (UAC) Tool, the users will be activated and ready to be added to workspaces immediately.

WHO USES

- Project Managers
- Regional System Administrators
- Program Certifiers

HOW TO

1. Using Internet Explorer, go to the ePM Portal.
2. Click 'UAC Tool' in the list of applications.
3. Click the User Access tab.
4. Click the User Request page.
5. Click the Add icon in the toolbar.

6. In the web grid, enter the following information:
   - Region
   - User's full legal name: First, Middle (if no middle name enter NMN), Last
   - Display Name
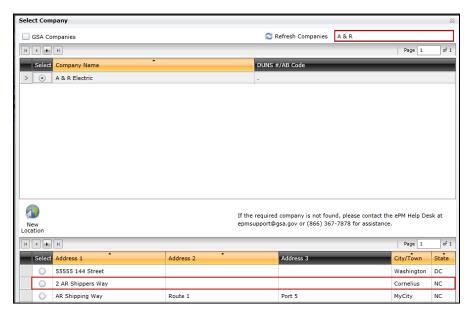   - Title
7. Select a Company by clicking the Search icon.

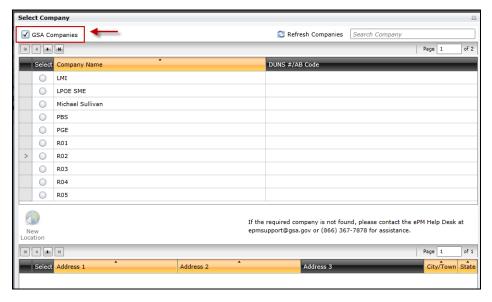8. Enter the company name in the Search box. Select the company and location as displayed below:

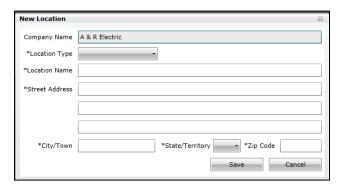NOTE: When adding a GSA employee, put a check box in the GSA Companies box to display a list of GSA locations.

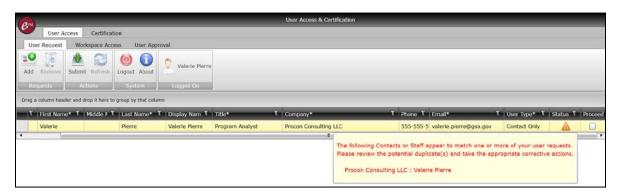9. If the correct location is not displayed, click 'New Location'.

      a.   Select Location Type from the dropdown menu.
      b.   Enter Location Name, Street Address, City, State, and Zip Code.
      c.   Click 'Save'.
10. Enter the Phone Number and Email Address.
11. Select Contact Only as the User Type.
12. Click 'Submit' in the toolbar.
13. The user account will be created in the Active workflow state.
14. If the user currently exists in ePM, the Status column will note an error (to view the details hover over the icon in the Status column). In this case, the user record must be validated or removed to continue.

15. To validate put a check in the Proceed column.

16. To remove, select the row and click 'Remove' in the toolbar.

17. When complete click Logout' in the top tool bar.

18. Click 'Save' in the top toolbar.

REFERENCE

Reference the following ePM Quick Reference Guides (QRGs) for additional information. QRGs can be accessed through the ePM Portal.

- QRG 02 - Using the ePM Address Book